STRATEGIC PLAN 2014-2016

MISSION AND VISION	STRATEGIC OBJECTIVE	ORGANIZATION GOALS	PERFORMANCE MEASURES AND TARGETS	DEPARTMENT GOALS	PERFORMANCE MEASURES AND TARGETS	TEAM MEMBER GOALS	PERFORMANCE MEASURES AND TARGETS	TEAM MEMBER ACTION ITEMS
Mission Statement Our core purpose is to create technology solutions for forward-thinking organizations to empower their success and to magnify their impact. .	1 Financial Sustainability: Grow our business in a responsible and controlled way to increase revenue by 30% year-over-year for the next 3 years while maintaining a 20% net profit margin each year.	1.1 Generate sales of $1.5 million by the end of the year. (Administration) (12/31/25)	M: $ in sales T: $2,535,000	1.1.1 Develop our credit card program. (Administration) (12/31/20)	M: Gross Revenue T: $50,000	1.1.1.1 Complete a park Master Plan (JoAnne Rogers) (12/31/20)	M: Total number of active cards. T: 12,000%	
				1.1.2 Software Licenses: Generate $300,000 from added software features by the end of each FY. (Administration) (12/31/16)	M: $ generated from added software features T: $300,000	1.1.2.1 Develop 8 software programs to monitor licenses. (Grant Howell) (12/31/16)	M: # of software programs T: 8	
						1.1.2.2 Build marketing collateral (Sales Director) (12/31/16)	M: % complete collateral T: 100%	
Vision Statement We envision being THE technology experts and resource center for small and medium-sized organizations.				1.1.3 Maintenance Contracts: Generate $500,000 in maintenance contracts. (Marketing) (12/31/16)	M: $ generated from maintenance contracts T: $500,000			
				1.1.4 Professional Consulting: Generate $700,000 in web design consulting. (Customer Service) (12/31/16)	M: $ generated from web design consulting T: $700,000			
Core Values		1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development. (Administration) (12/31/16)	M: % of budget allocated for product development T: 50%					
· Purpose & Growth - our foundation is built on our purpose and provides a place for our team's passion.		1.3 Increase average billable hour factor. (Administration) (12/31/16)	M: $ per billable hour. T: $300					
· Client Focus - a razor-sharp focus on our customer's growth is essential and the only way to succeed. · Integrity - to have honesty and respect	2 Professional Services: To be the professional partner of choice.	2.1 Professional Service: Acquire 10 new consulting clients at $10,000+ per month. (Administration) (12/31/16)	M: # of new consulting clients T: 10	2.1.1 Develop 2 new webinars a quarter to assist Sales Team. (Marketing) (12/31/16)	M: # of new webinars T: 8	2.1.1.1 Develop 15 minute "Basic Package" presentation. (Crystal O'Langdon) (12/31/15)	M: % Complete T: 100%	
						2.1.1.2 Review	M: % Complete	2.1.1.2.1 Develop

- for all individuals.
- Leadership - to empower and inspire entrepreneurial leaders.
- Professionalism - to be professional in our actions to our clients, partners and each other.
- Excellence - to continually pursue knowledge and learn.
- Community Service - to effectively help organizations to make an impact
- Fun - to have enjoyment and fulfillment in our work.

					existing presentations format for consistency. (Crystal O'Langdon) (03/22/14)	T: 100%	campaign materials for 3 new markets. (Crystal O'Langdon) (12/31/16)
					2.1.1.3 Create a consistent slide template for Webinars. (Thomas Wright) (12/31/15)	M: % Complete of standard templates T: 100%	
			2.1.2 Develop a new software program to track clients (IT Group) (12/31/15)	M: % of program completed T: 100%			
			2.1.3 Work on new program for.... (IT Group) (12/31/16)	M: T: 50%			
		2.2 Industry Expertise: Be rated among the Top 10 fastest growing tech companies in 2016. (Marketing) (12/31/16)	M: Industry ranking T: 10				
	3 Maintenance Contracts: To be viewed as the top technology resource in the western region.	3.1 Maintain 85% of our current customers. (Administration) (12/31/16)	M: % customer retention T: 85%	3.1.1 Implement marketing campaign to draw in new markets. #studentlearning (Marketing) (12/31/13)	M: % completed T: 100%	3.1.1.1 Research and identify 6 opportunities in new markets that company could expand into. (JoAnne Rogers) (06/30/16)	M: % complete T: 6	3.1.1.1.1 Complete a competitive analysis study of our current and prospective markets. (Tom Jones) (04/30/12)
						3.1.1.2 Develop campaign material for new markets. (Sales Director) (12/31/13)	M: % complete T: 100%	
						3.1.1.3 Create new web pages (rough draft) for the campaign promotion. (Randall Scion) (05/31/13)	M: % Complete T: 100%	
				3.1.2 Develop a competitive analysis survey for our market. (Administration) (12/31/16)	M: % Complete T: 100%		
				3.1.3 Increase sales close rate by 25% to achieve a 43% close	M: Close rate T: 43%		

				rate by EOY. (Marketing) (12/31/16)		
	3.2 Achieve an average of a 9 point satisfaction score on exit surveys. (Customer Service) (12/31/16)	M: Customer satisfaction score T: 9				
	3.3 Licensing: Acquire 3,000 total licenses by the end of the year. (12/31/16)	M: # of new licenses T: 3,000	3.3.1 Grow average monthly licenses by 40% to 840 (IT Group) (12/31/16)	M: # Licenses T: 840		
			3.3.2 Grow new customer conversions by 100% to an average of 78/month. (IT Group) (12/31/16)	M: # of new licenses T: 78		
			3.3.3 Grow new customer trials by 25% to mark of 88 New Trials per month. (IT Group) (12/31/16)	M: # of New Trials T: 88		
			3.3.4 Maintain or decrease the Churn Rate of Licenses which is currently at 7.99%. (Customer Service) (12/31/16)	M: % Churn T: 7.99%	3.3.4.1 Secure coaching on Customer Success Manager for team. (Crystal O'Langdon) (12/09/16)	M: % Complete T: 100%
	3.4 Maintenance Contracts: Acquire an average of 7 new maintenance contracts per month (12/31/16)	M: avg monthly # of new maintenance contracts T: 7	3.4.1 Identify and maintain list of 65 target customers that could benefit from a maintenance contract. (Marketing) (12/31/16)	M: # of target customers T: 65		
4 Innovation/Product Development: Continue to develop technology innovation.	4.1 Launch integration with 4 other applications. (IT Group) (08/30/16)	M: Applications Integrated T: 100%	4.1.1 Map out entire integration process (Web Specialists) (06/30/15)	M: % of Map completed T: 100%		
5 Overall Operations: Develop and maintain an infrastructure that allows for a virtual office and efficient overhead.	5.1 Set up computers to be accessed from any destination. (Administration) (12/31/15)	M: % complete of computer accessible from any destination T: 100%	5.1.1 Purchase necessary software/hardware or make arrangements with an internet service provider for virtual access. (IT Group)	M: % complete T: 100%		
	5.2 Define all procedures and process in writing in order to support projected growth. (12/31/15)	M: % of process in writing. T: 100%				
	5.3 Blogs &	M: # of pieces published	5.3.1 Write 1 blog post	M: # of blog posts		

	Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved. (Marketing) (12/31/16)	weekly T: 6	per week (Web Specialists) (12/31/13)	T: 52		
			5.3.2 Write 2 newsletters per month. (Administration) (12/31/13)	M: # of newsletters T: 2		
6 Training: Actively help our team to develop and grow professional and personally by supporting a flexible work life, providing intellectually engaging work, and fair compensation.	6.1 Train sales people in best practices (Marketing) (11/30/16)	M: actual attendance per year by all 12 managers T: 14				
	6.2 Develop better communication and presentation skills to increase ability to work with and assist clients. (Customer Service) (12/31/13)	M: % complete in communication/presentation skills T: 100%				
7 Community Involvement: Develop and implement a corporate giving strategy that is in line with our competitive advantages.	7.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue. (Administration) (12/31/16)	M: % of license revenue T: 15%	7.1.1 Determine budget for Community Involvement party. (Customer Service) (05/31/15)	M: % Complete T: 100%	7.1.1.1 Solicit ideas for theme, entertainment, catering for Community Involvement party. (Thomas Wright) (07/31/15)	M: % Complete T: 100%